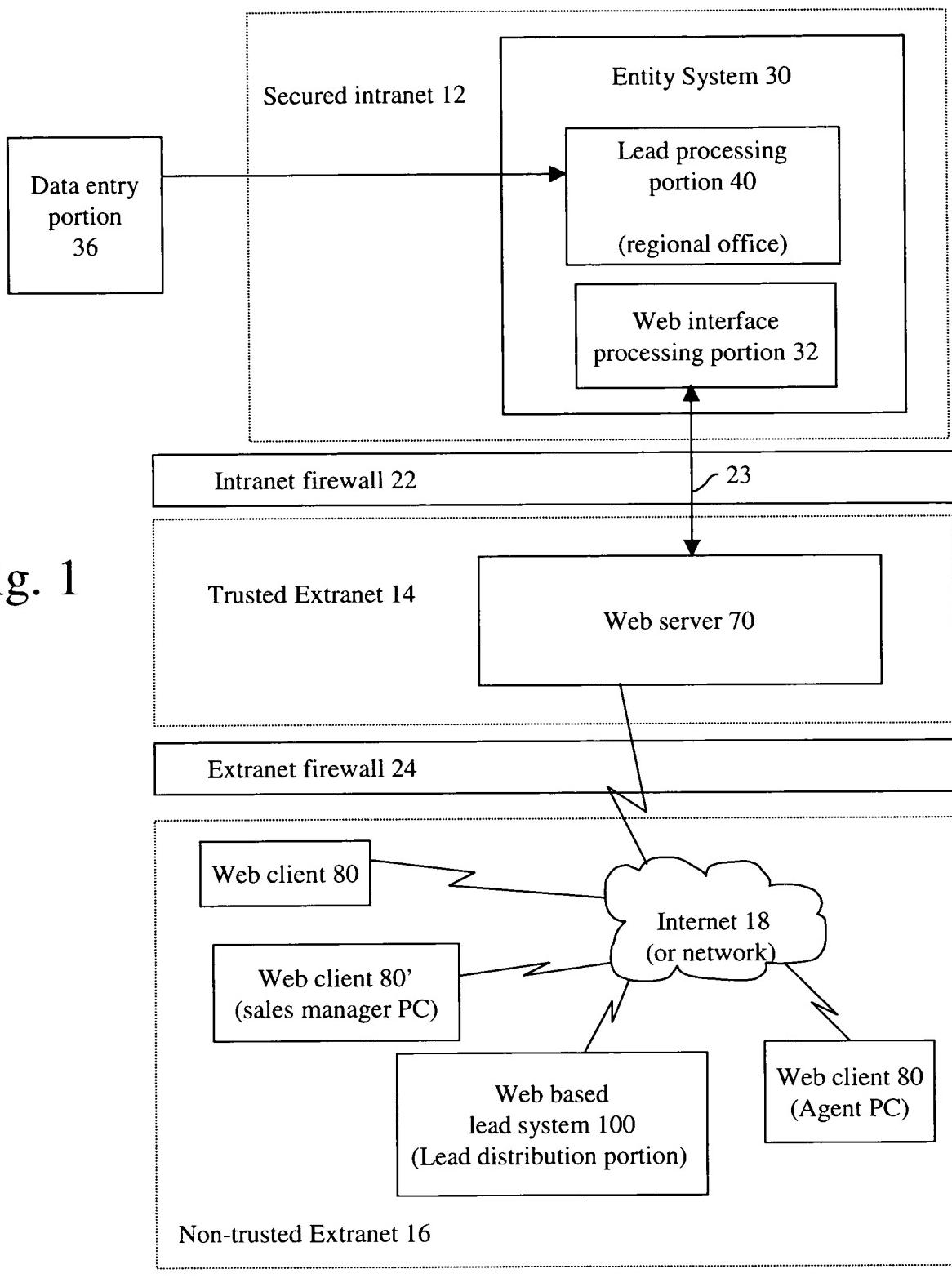


Fig. 1



SALES LEAD SYSTEM 10

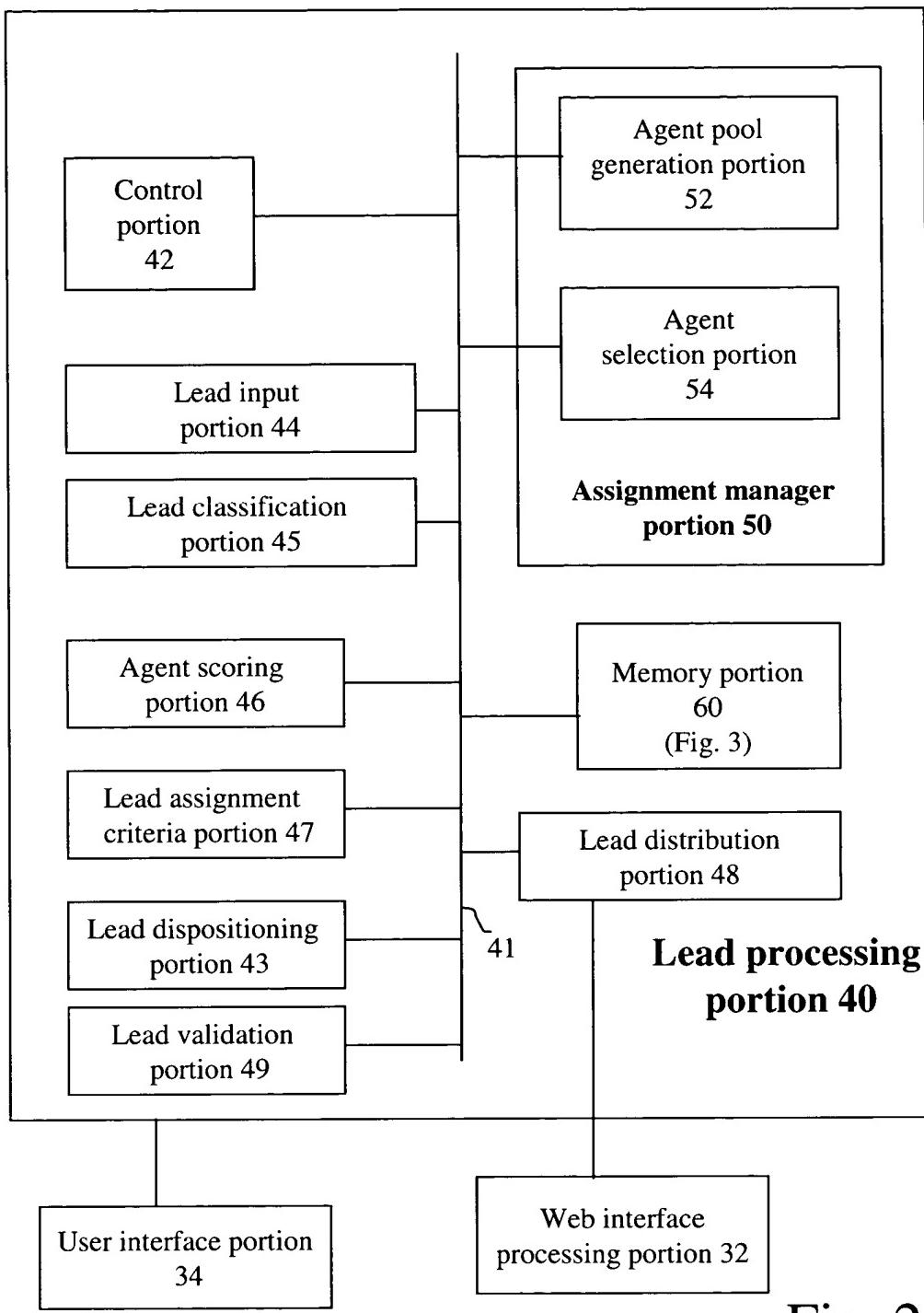


Fig. 2

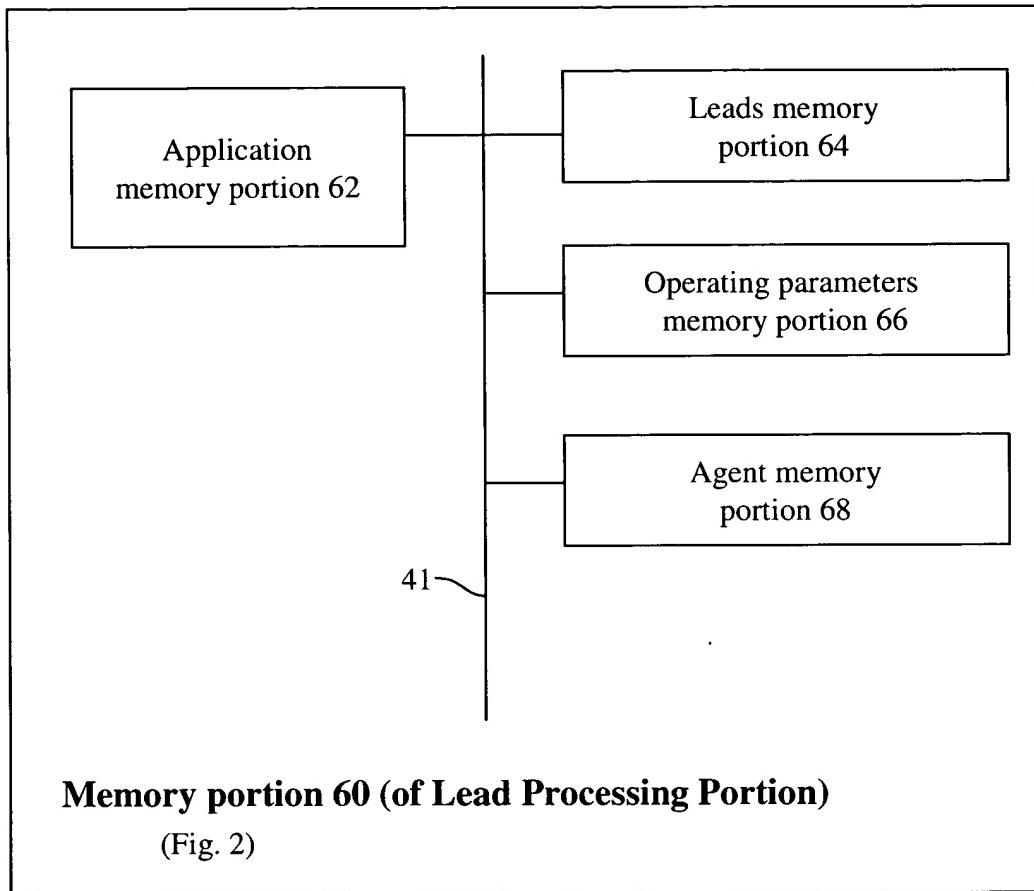


Fig. 3

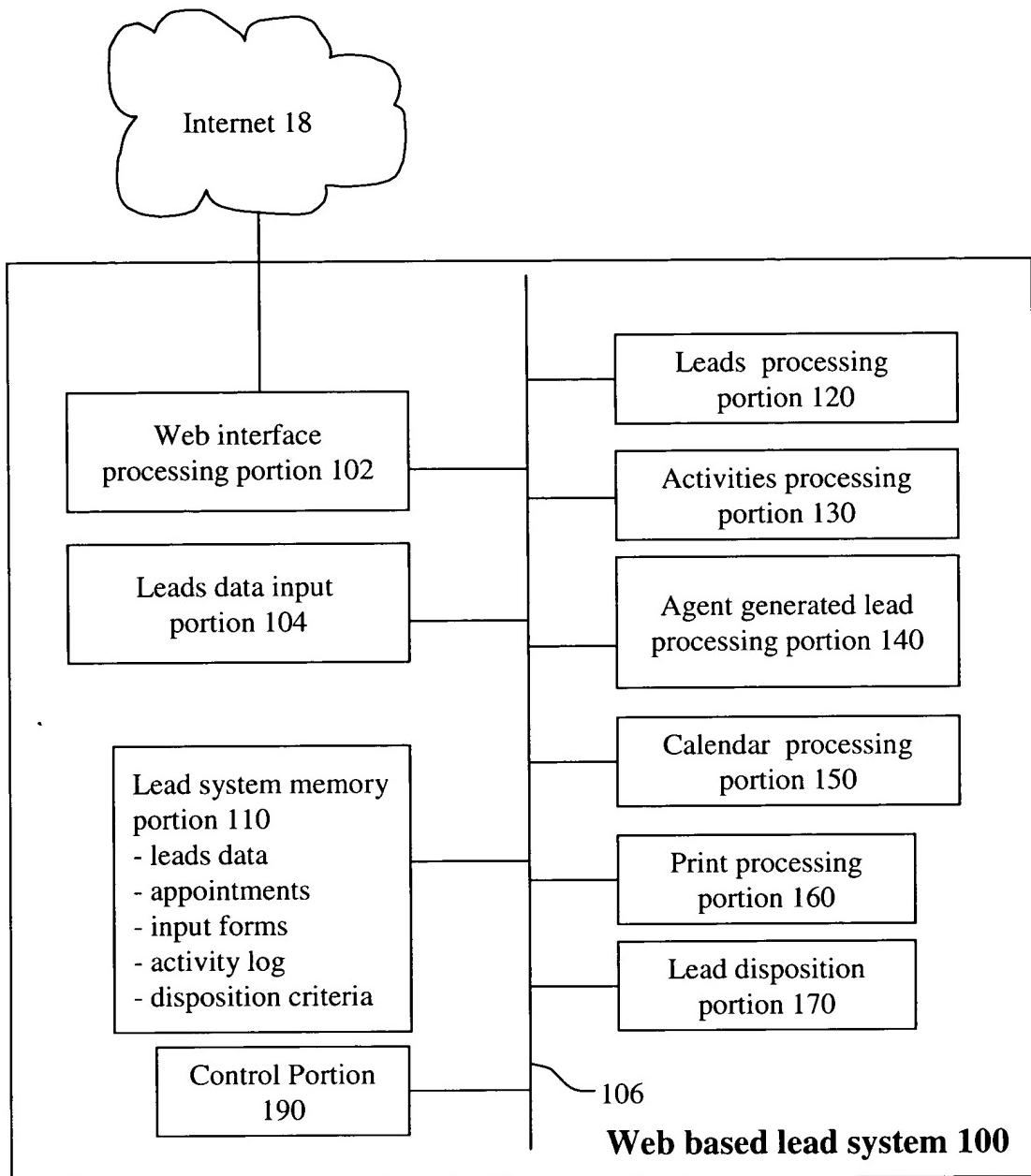


Fig. 4

Fig. 5

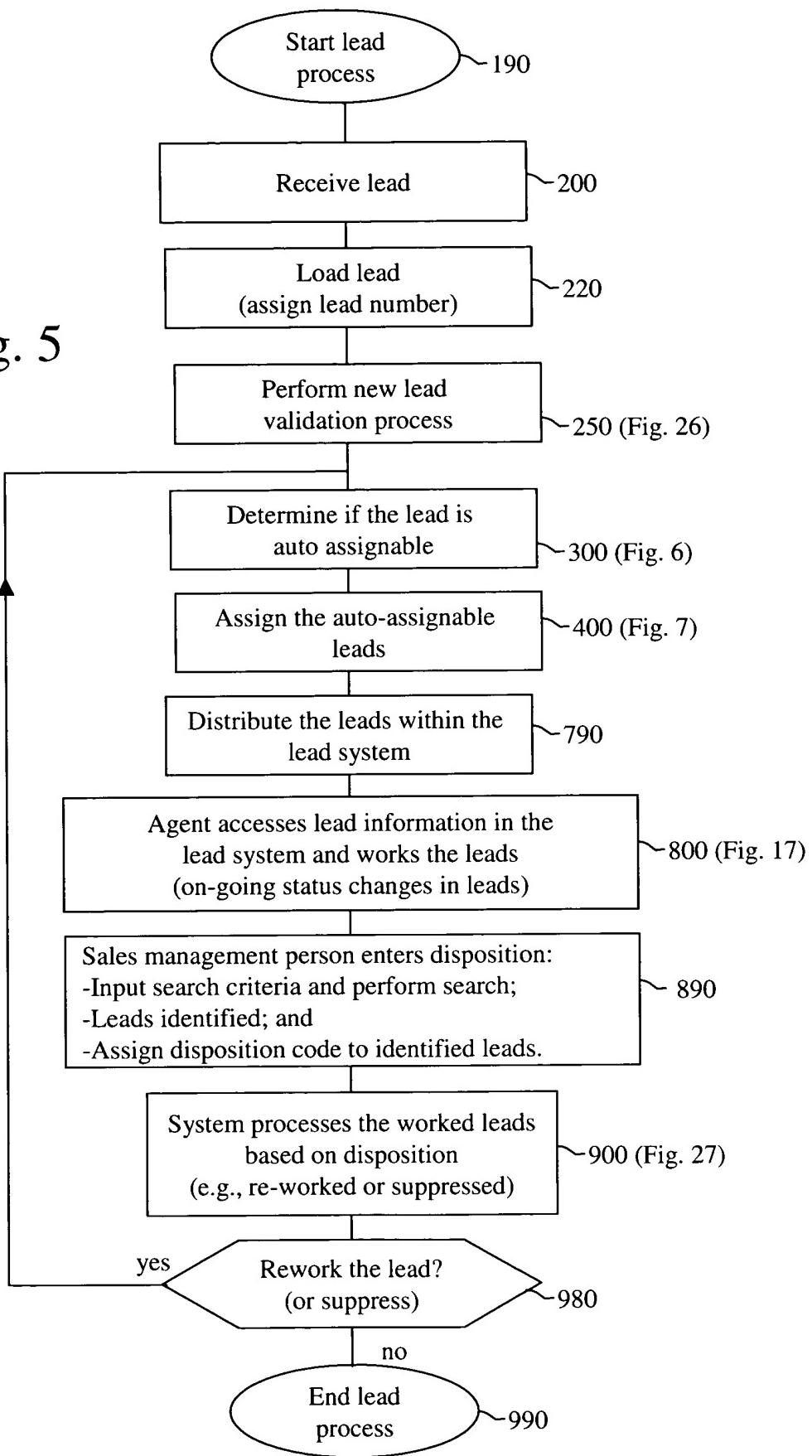


Fig. 6

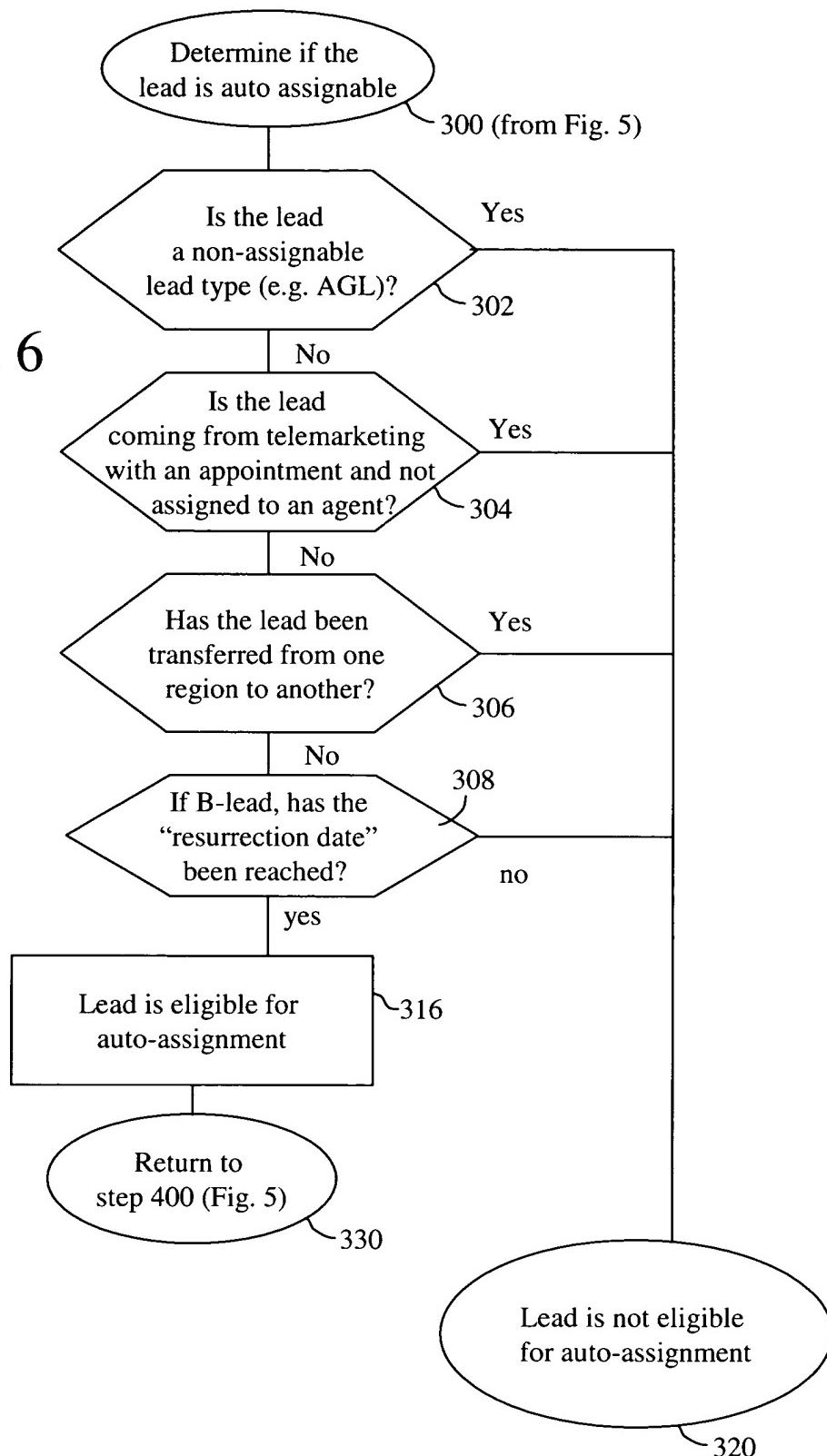
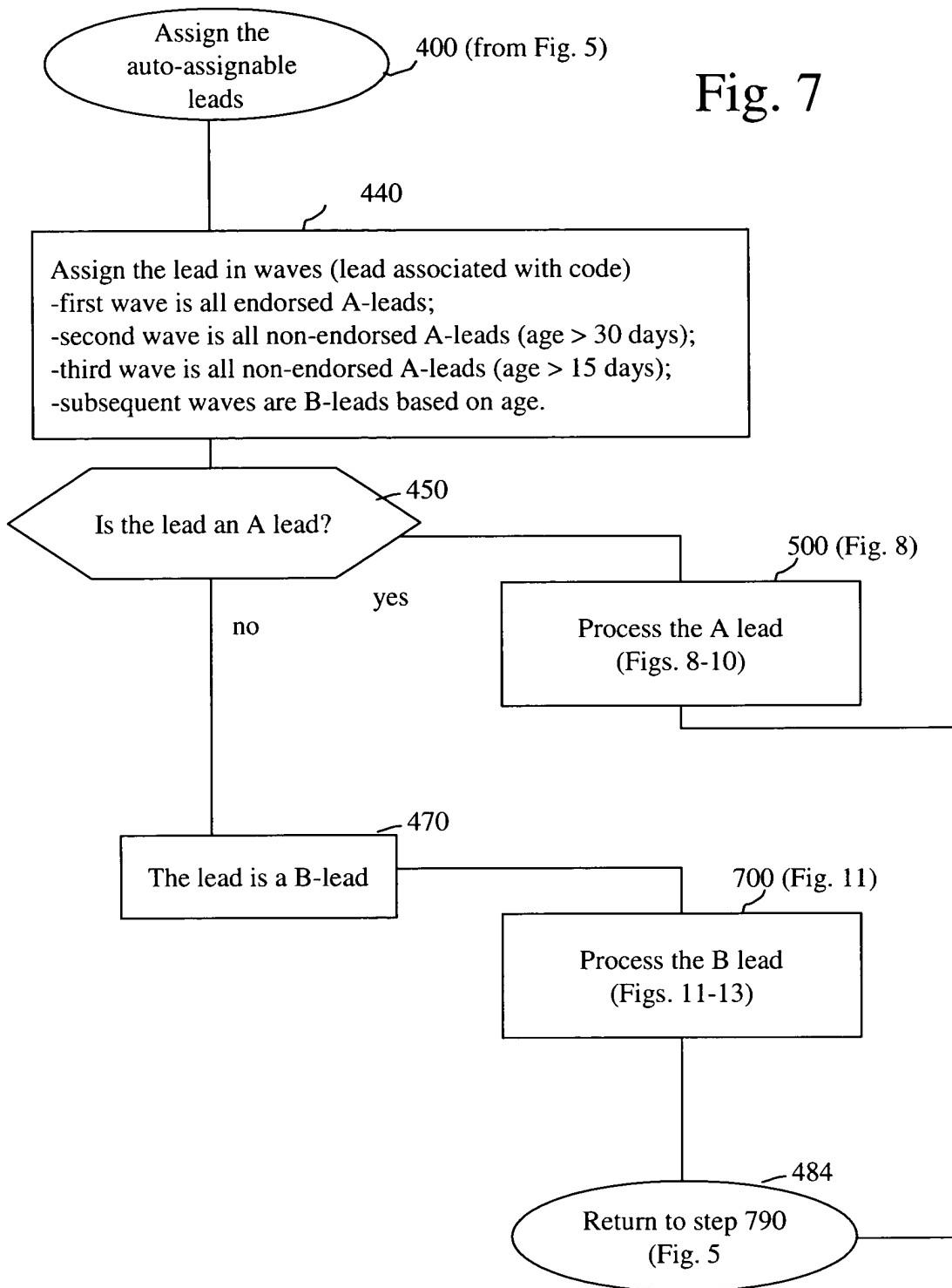


Fig. 7



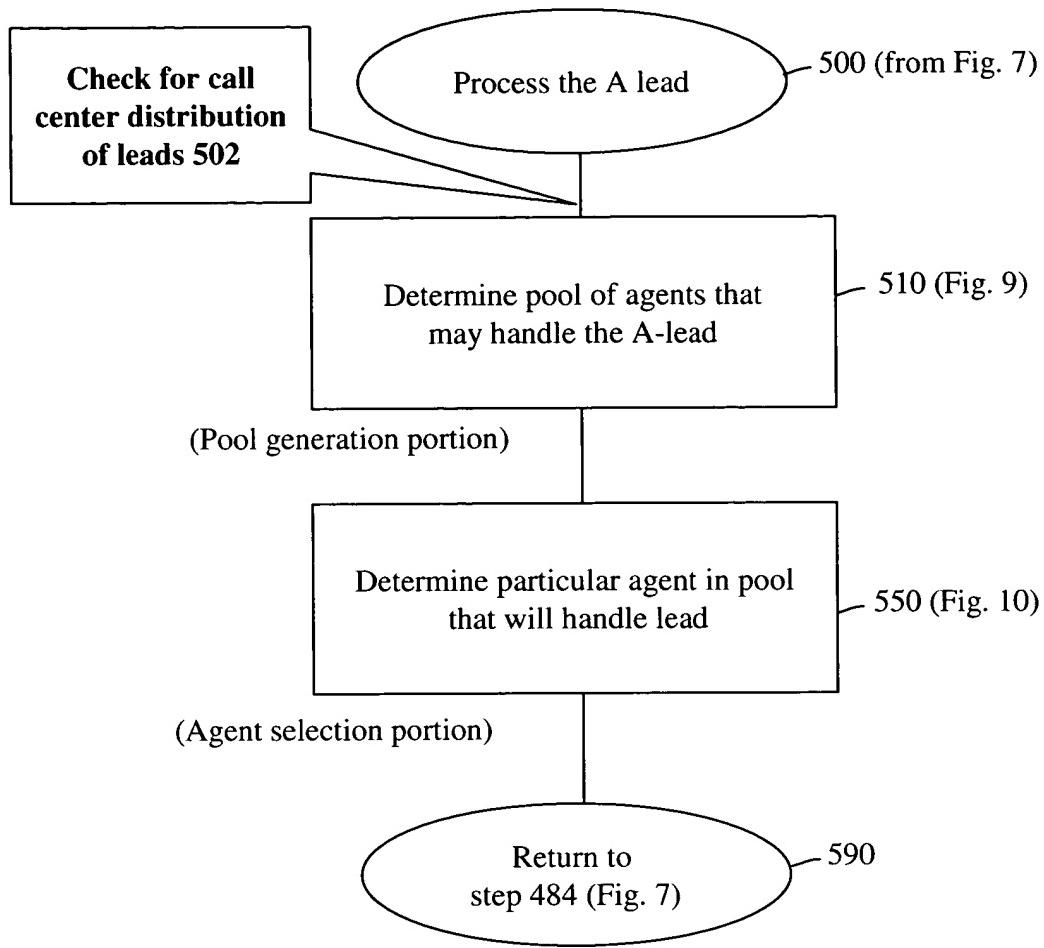


Fig. 8

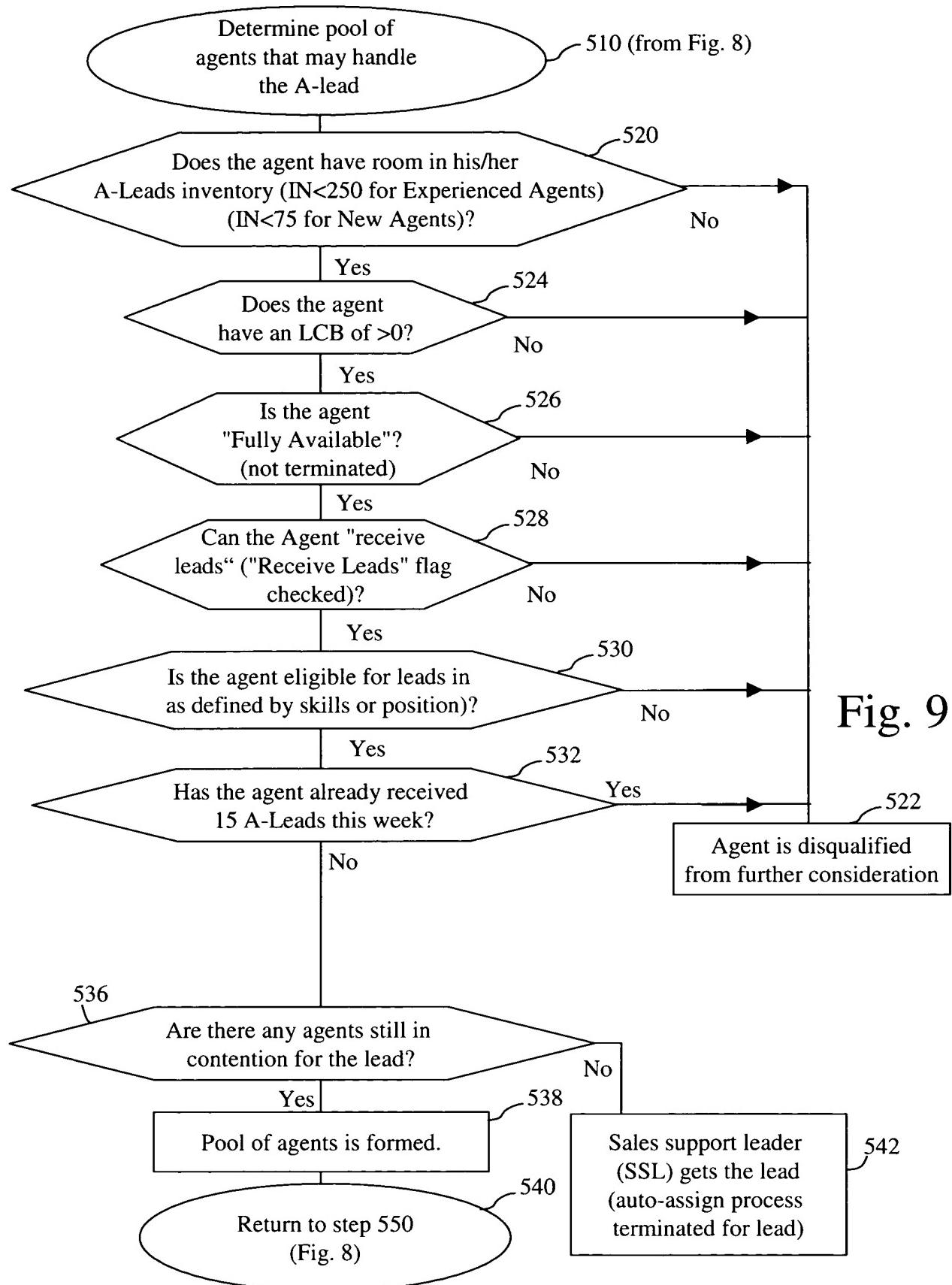
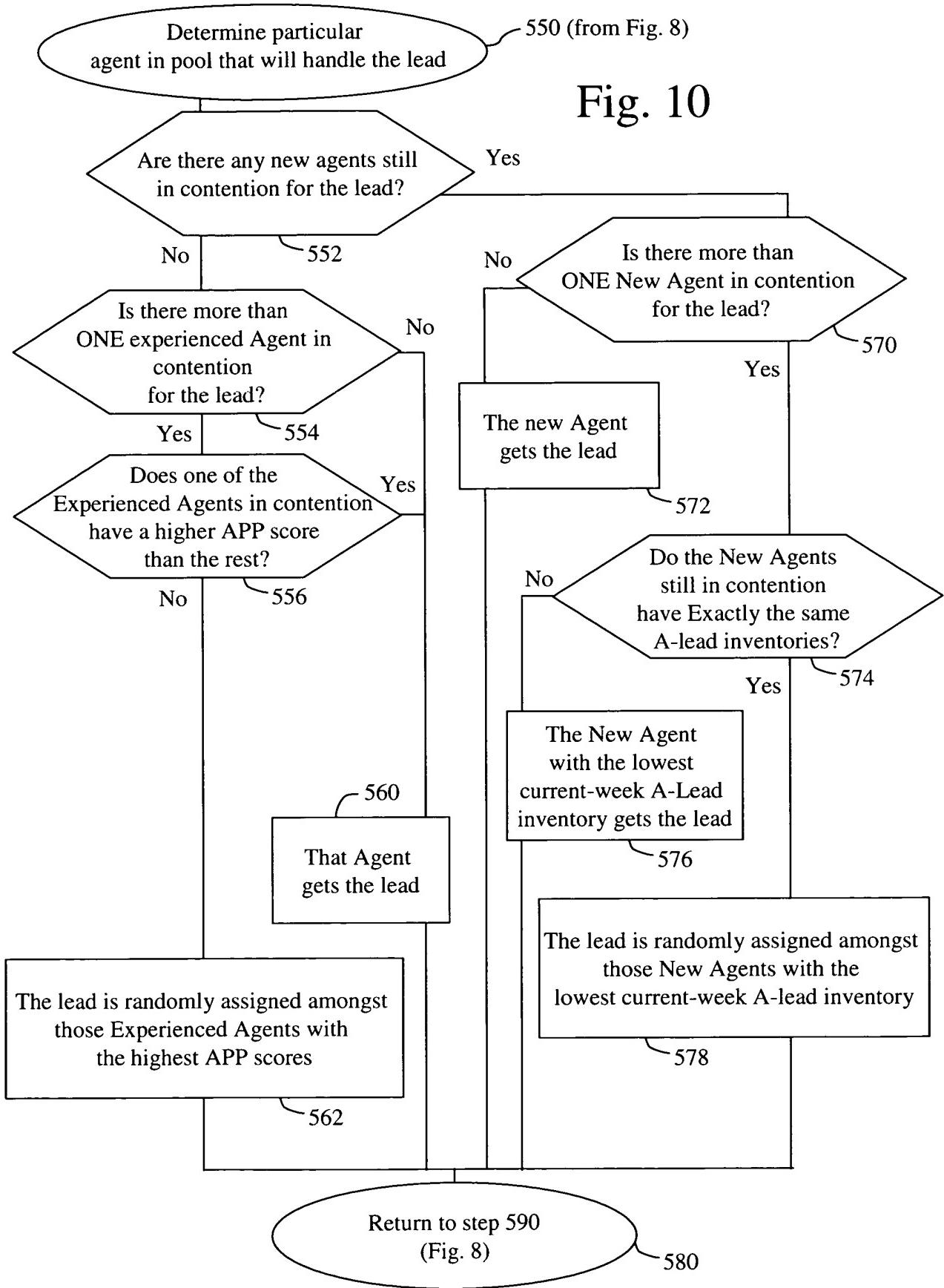


Fig. 10



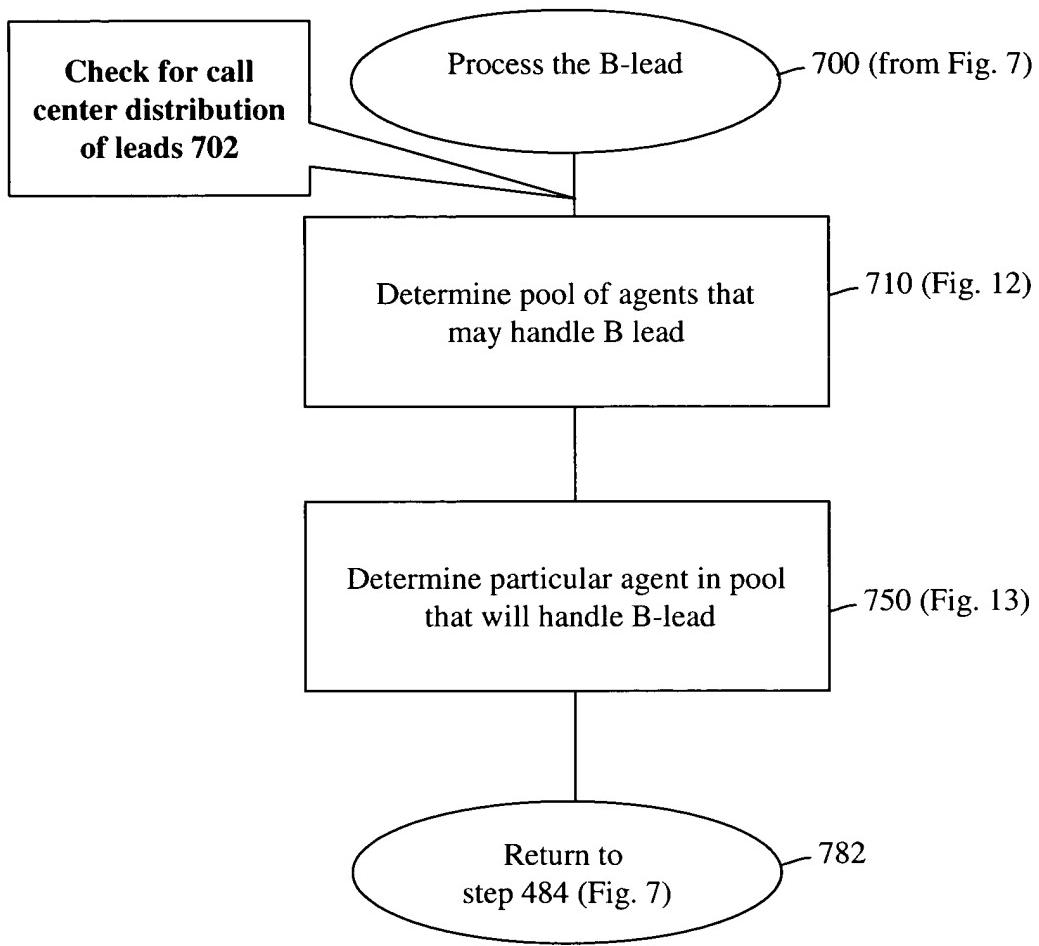


Fig. 11

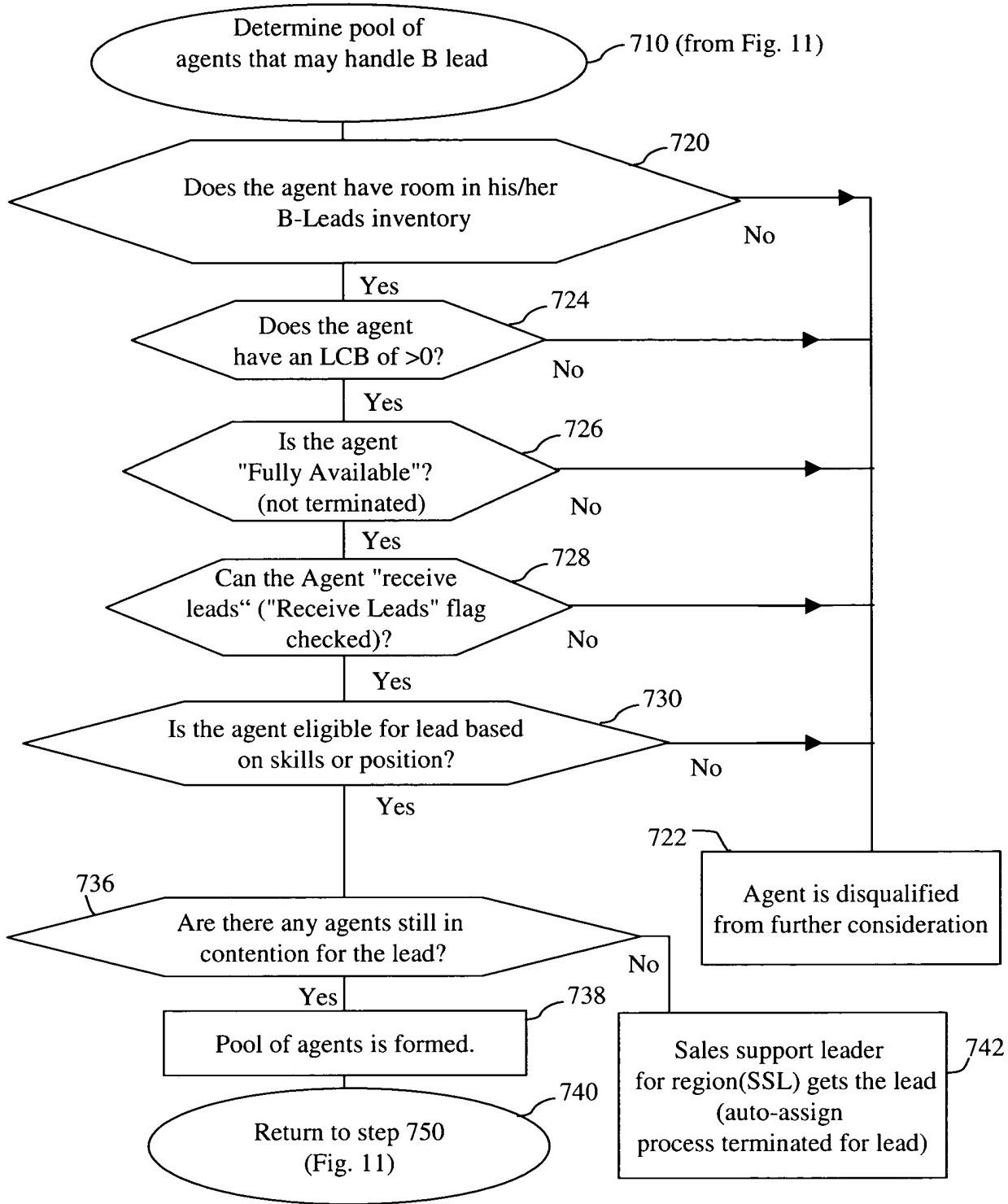


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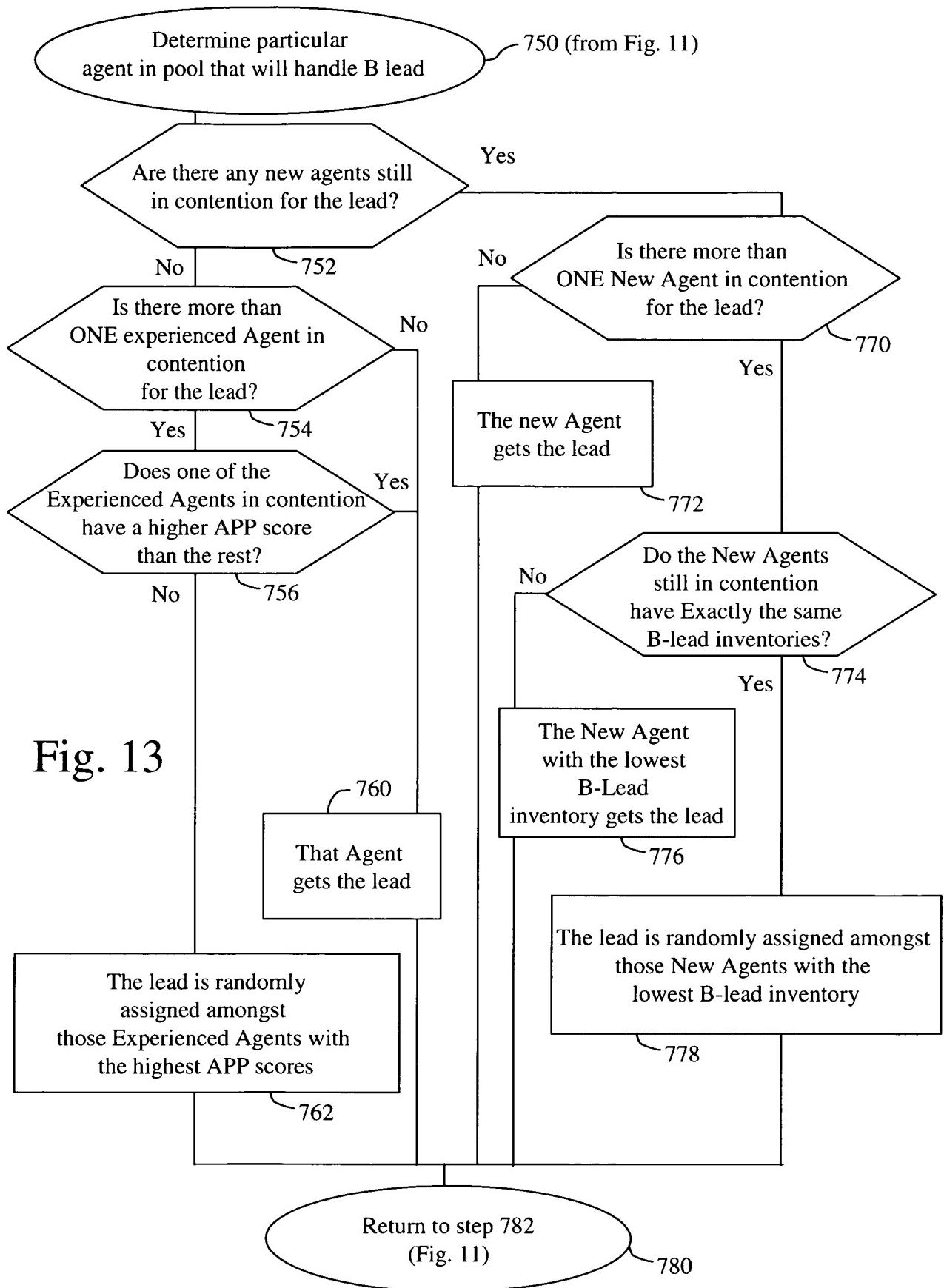


Fig. 13

Fig. 14

Automated Lead Distribution - For EACH lead

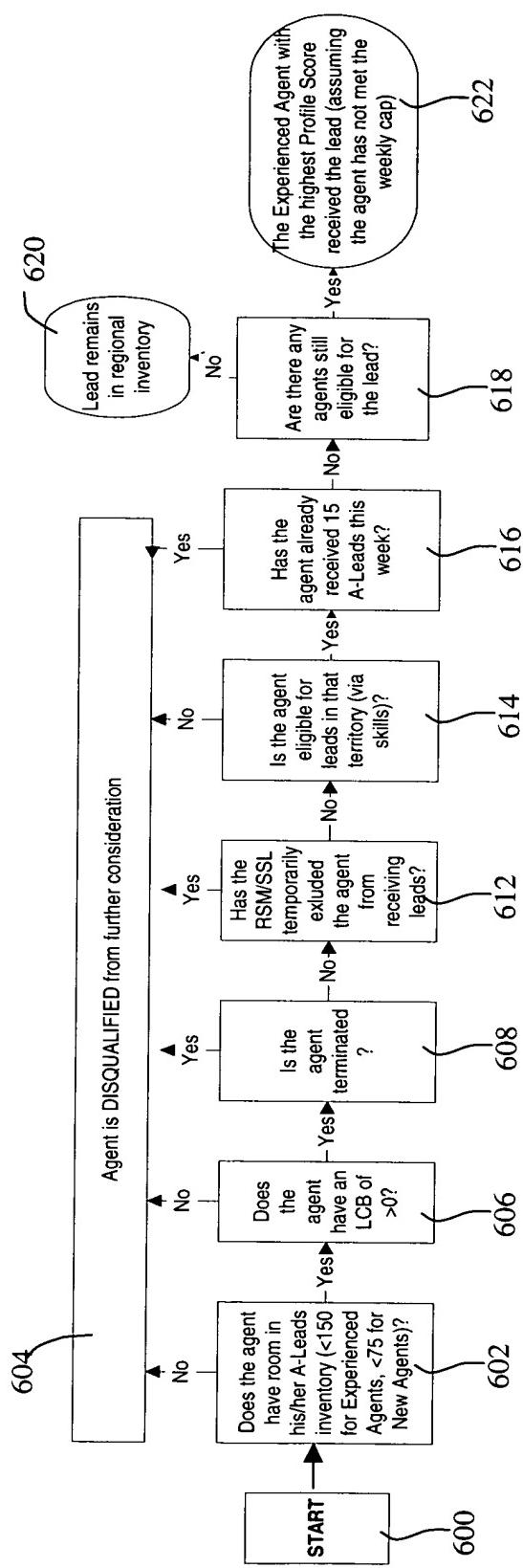
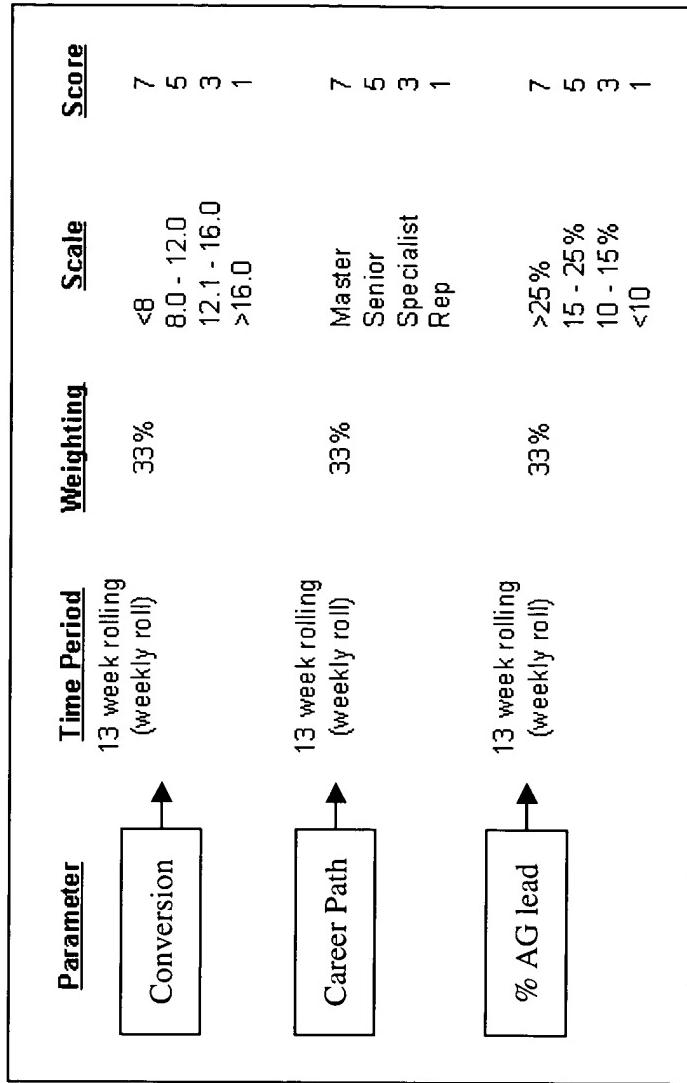


Fig. 15

Agent Performance Profile (Scoring Model)



ILLUSTRATIVE DISPOSITIONS OF LEADS:

Suppressed

STOP – RAPR
STOP – NQA (not qualified agent)
STOP – RACR (remove at client request)
STOP – NQHP (not qualified-permanent health reasons)
STOP - GROUP POLICY
STOP – DECEASED
DUPLICATE MAILING
INCORRECT
AGL

Rework

AUTO DISPOSITION
AUTO DISP - TERMINATED AGENTS
AUTO DISP - AGED 180+
AUTO DISP - AGED 120+
AUTO DISP - AGED 90+
UNWORKED
UNSUPPRESS-A
UNSUPPRESS-B

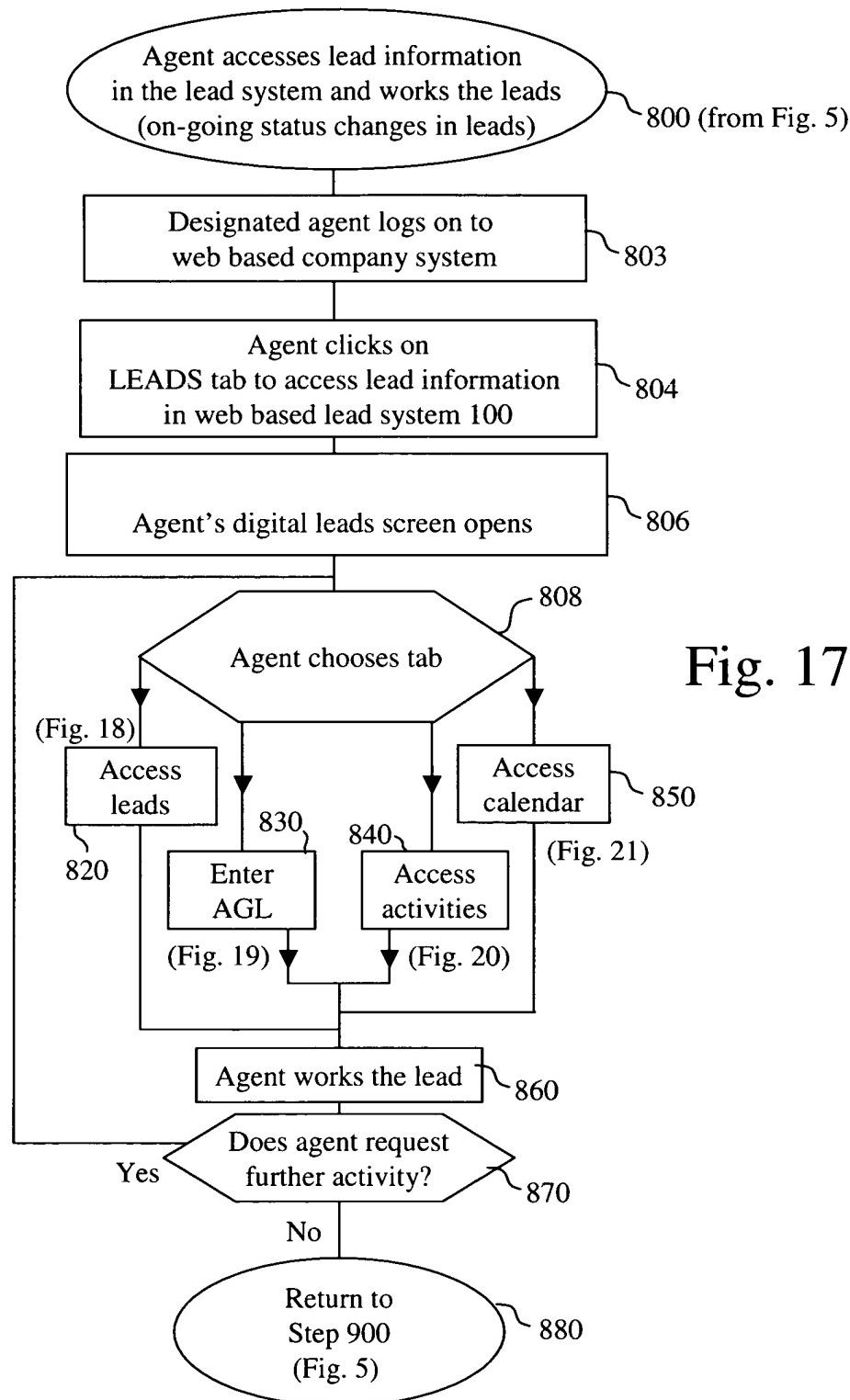
Application Submitted

APPLICATION SUBMITTED – PHONE SALE
APPLICATION SUBMITTED

Sleep

NAS (no appointment set)
NAS – COMPETITOR (policy with competitor)
NAS – NO CONTACT
ANI (appointment but not interested)
NO INFORMATION

Fig. 16



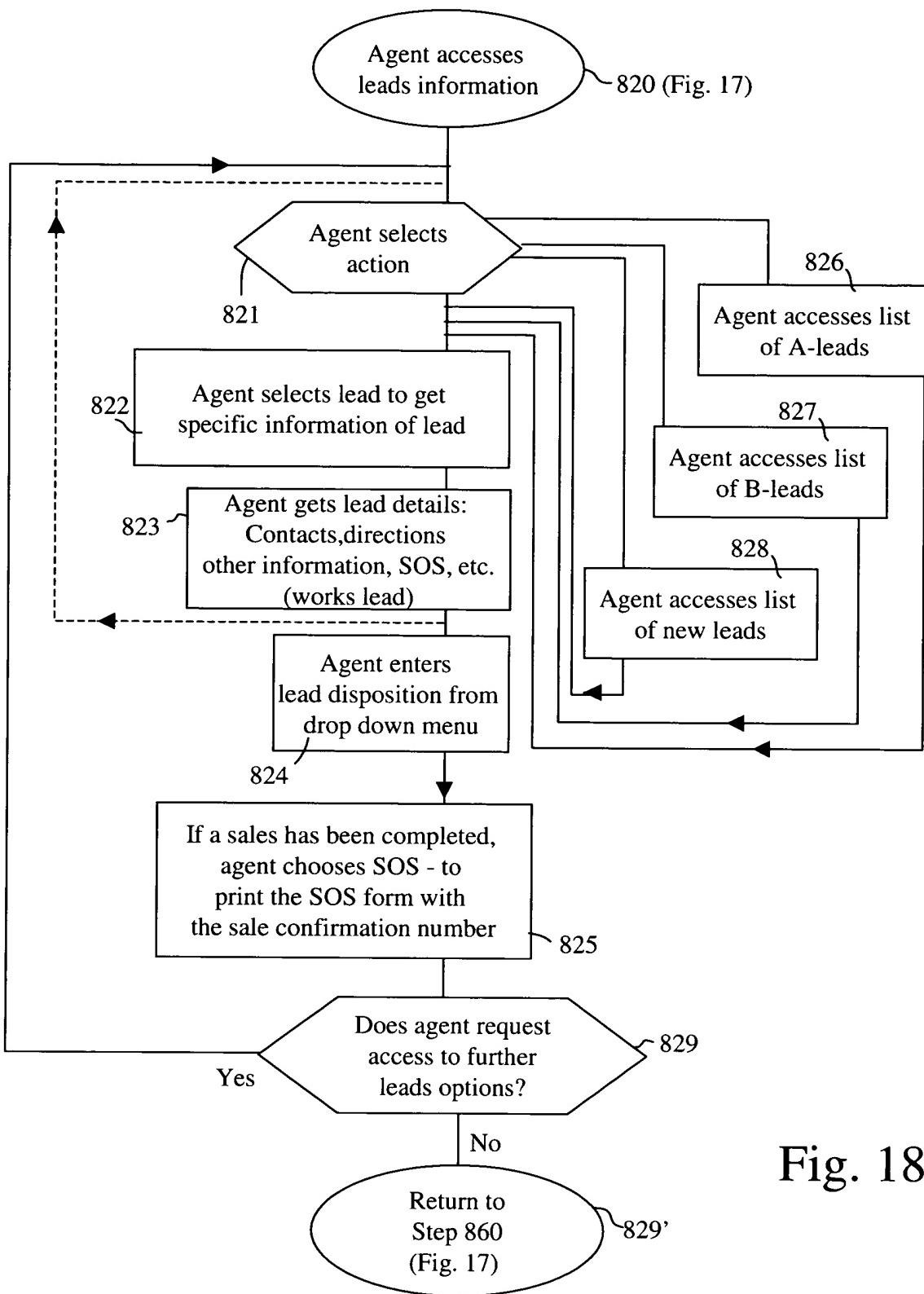


Fig. 18

Fig. 19

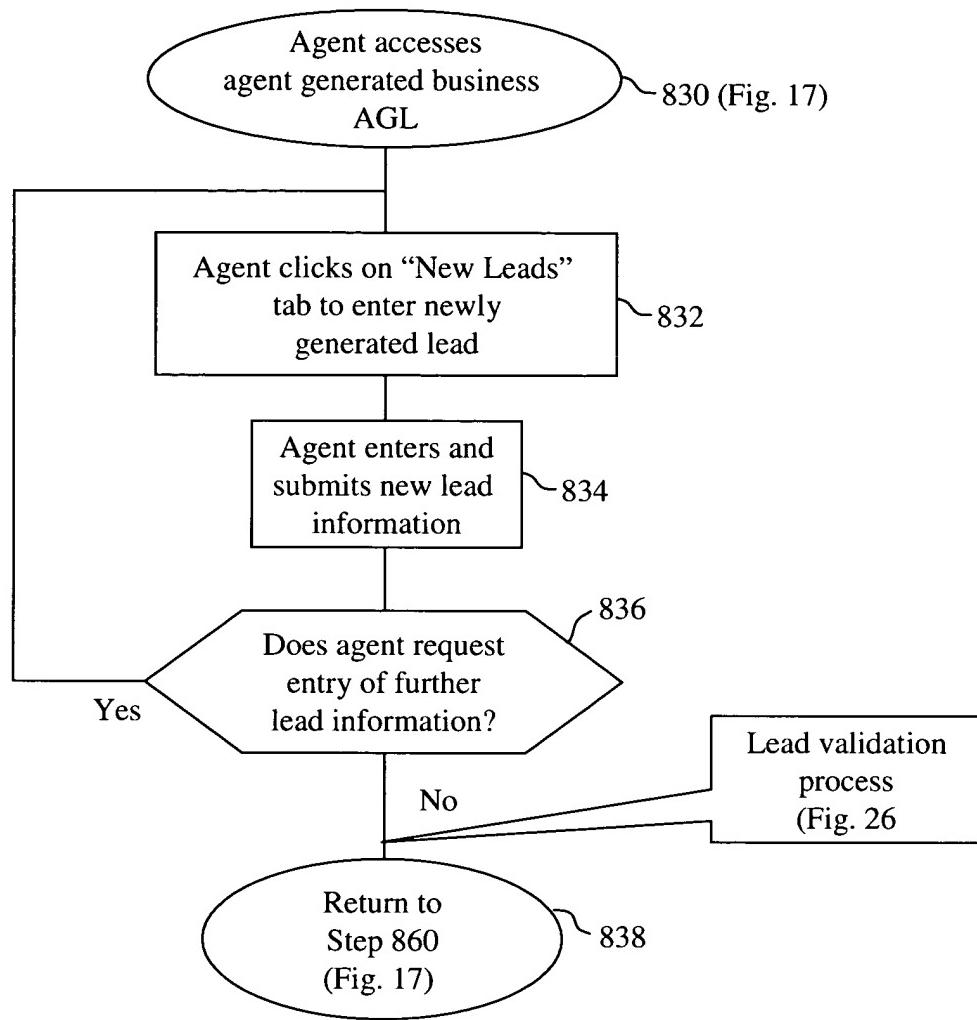


Fig. 20

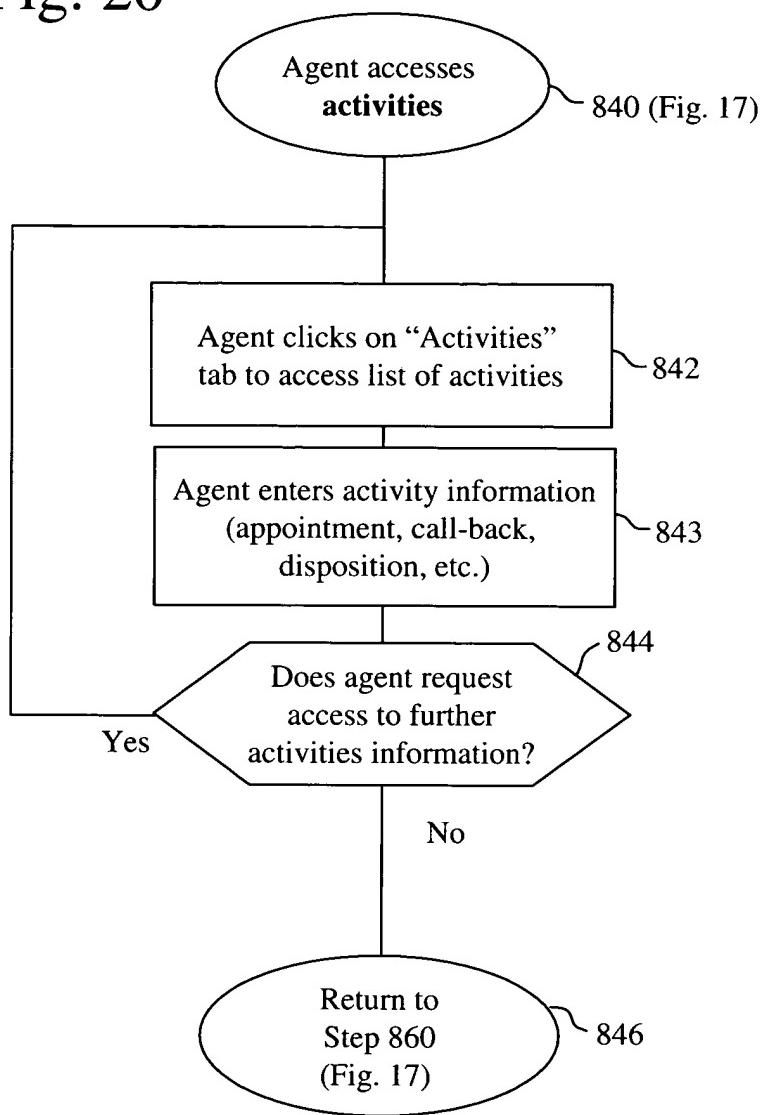
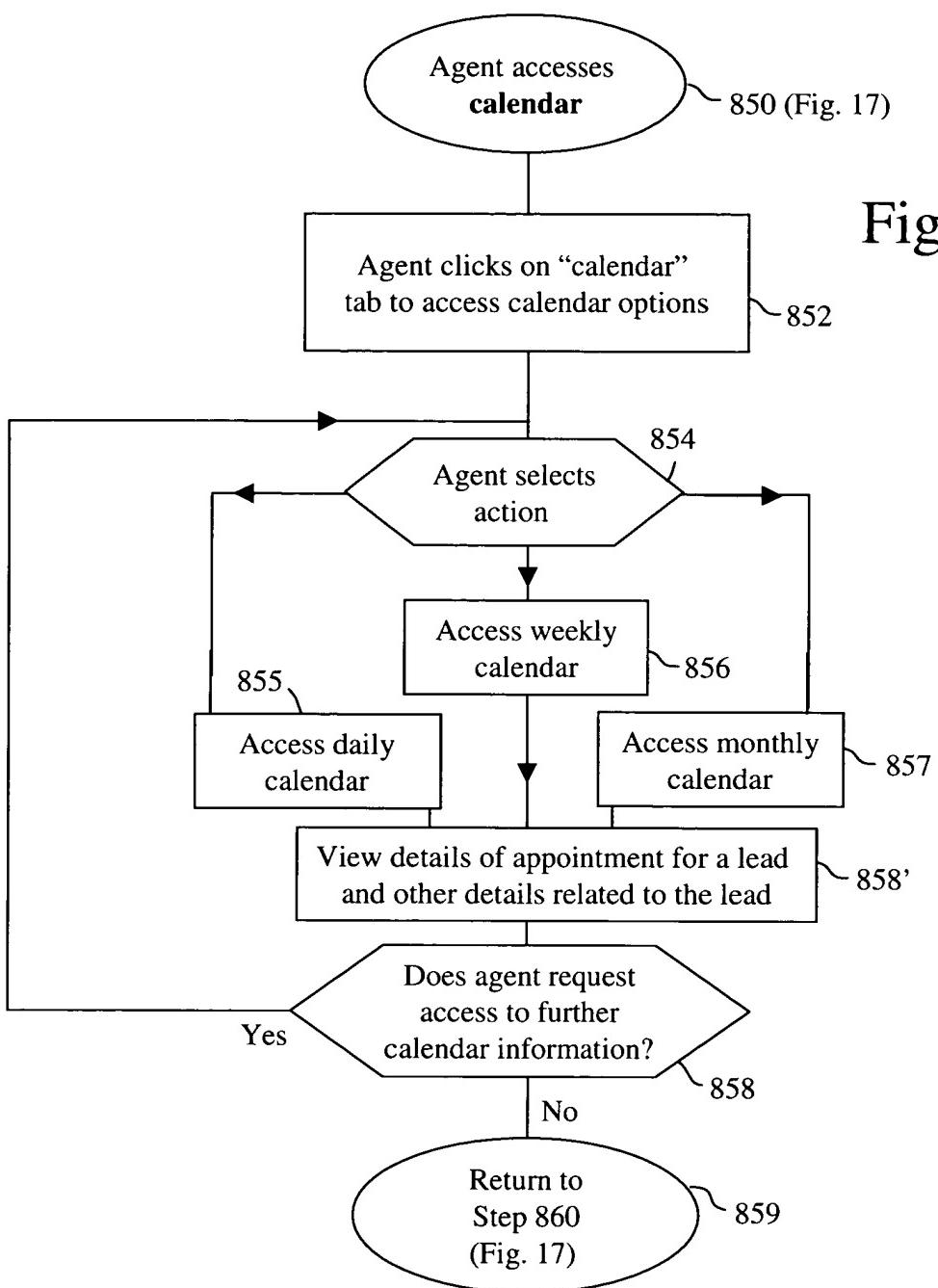


Fig. 21



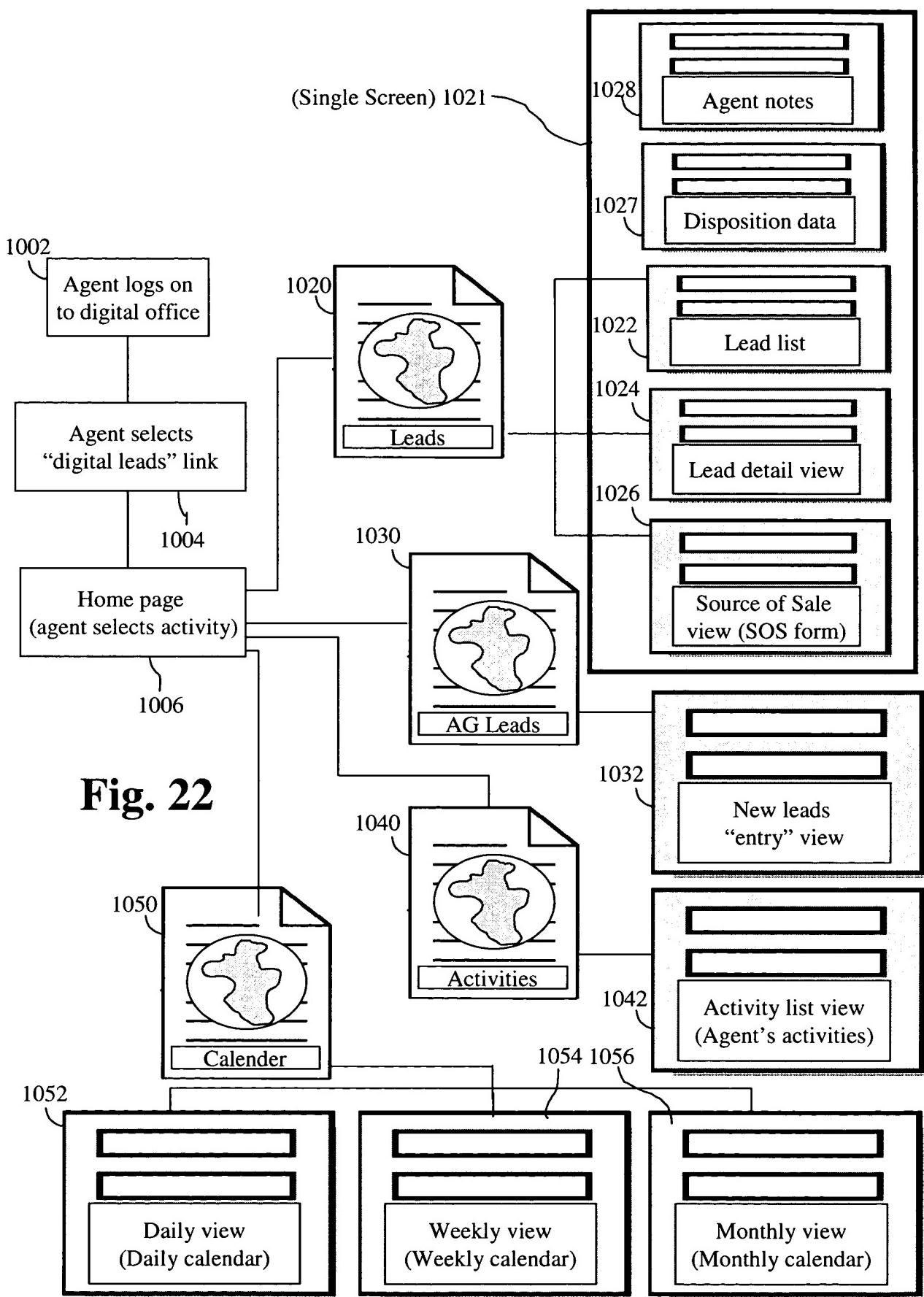


Fig. 23

What (Criteria)	Description	Who	Processing Aspects
Territory	Territories will be assigned to each agent	Sales Manager	Change “territory” field
Position	A position will have a type of New Agent, Experienced Agent, Telemarketing, or other. Appropriate points will be assigned based on the type. Separate rules will specify the workload for telemarketing positions.	Sales Manager, Teleservices manager	Change “Position” field. Automated process to update from New Agent to Experienced Agent
Endorsement	A skill on the employee will be compared to a flag on the lead.	Sales Manager	Create field for skills
LCB > 0 (Lead credit balance)	Criteria will be set up so that an agent must have at least one lead credit in order to get leads in that assignment session.	Lead Processing Portion	Create criteria in Assignment Rule
“Group X” Leads or other specialized leads	Agent skill flag created that will be compared to the appropriate code on the leads.	Sales Manager	Create field for skills
Get Leads?	This flag must be true in order for an agent to get leads.	Sales Manager	Field in agent data
Channel	Rules will be created that always route certain leads to positions associated with alternative channels.	Lead Processing Portion	Set up special rules to route leads to a Channel
Lock Assignment	The flag must be set for false for the lead to be part of the assignment process.	Sales Manager, Automated in some cases	Flag associated with lead.

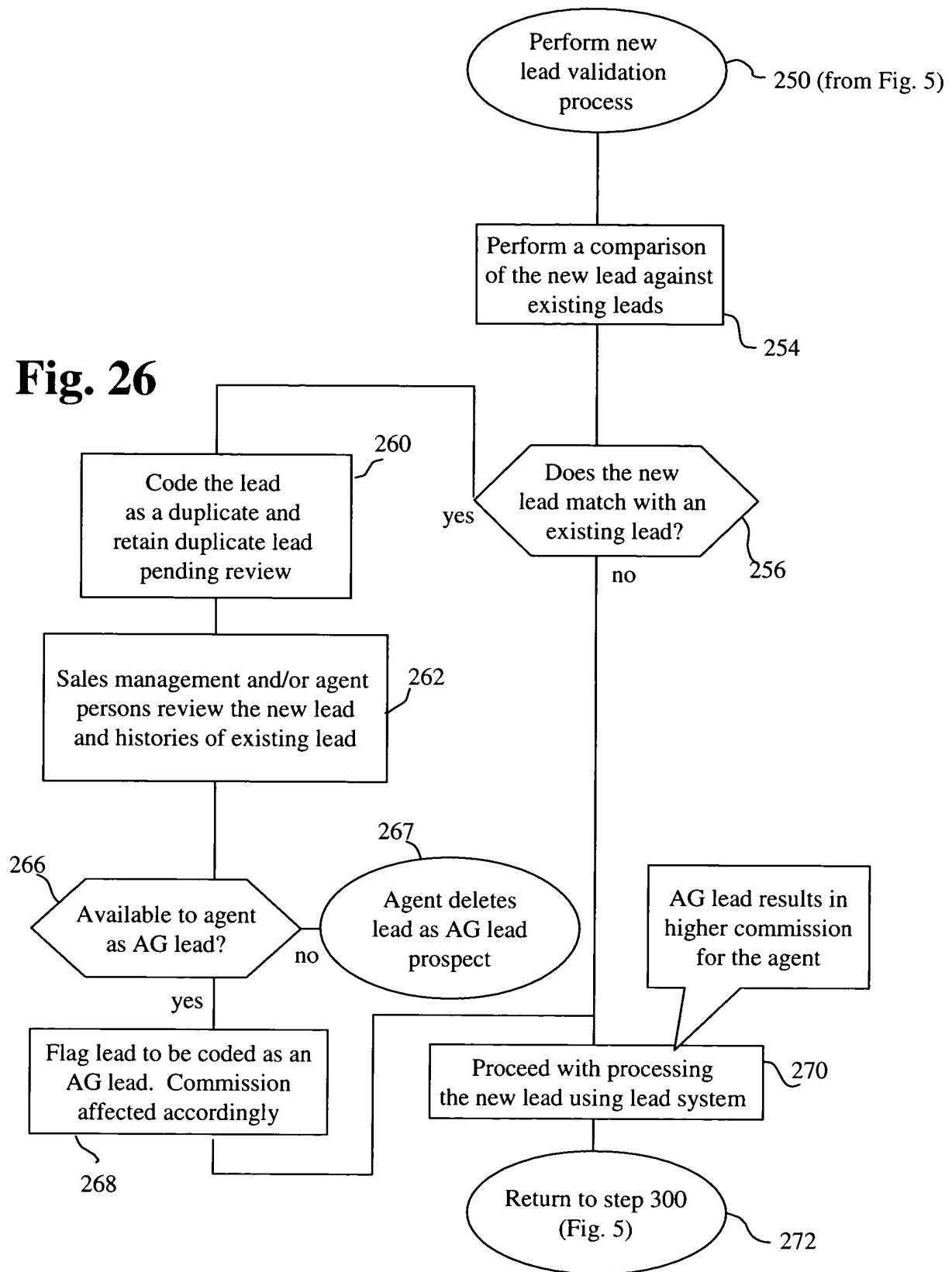
Fig. 24

What (Criteria)	Description	Who	Processing Aspects
Resurrection Date	A-lead must have a resurrection date equal to or earlier than the current date in order to be assigned.	Automated	Set through disposition
Release Flag	This flag must be set in order for an agent to see a lead. Released leads should not be assigned through assignment manager.	Sales Manager	Flag associated with lead.
Agent Profile Score	This score is updated weekly and is used to prioritize agents for the assignment of leads.	Automated	Automated process will score weekly.
A-Lead Conversion	Metric of how many A-leads to achieve sale	Automated	Automated
Appointments Seen	Value of how many appointments were seen in a given week	Automated	Automated process will calculate weekly
A-Lead Inventory	Amount of A-lead inventory the agent currently has	Automated	Automated process will calculate weekly
LCB	“Lead credit balance”	Automated	Automated process will update LCB Balance Weekly
% AGB	% of agent generated business (AGB) submitted	Lead Processing Portion	Weekly feed, or calculated weekly by Lead Processing Portion

Fig. 25

What (Criteria)	Description	Who	Processing Aspects
Default Rule	There needs to be a position in each region to which leads are assigned if no one else qualifies for the lead.	Lead Processing Portion	A rule will be added to each region or hub that will assign a lead to this person if no one else qualifies.
A-Lead CAP	Maximum number of A-leads	Lead Processing Portion	A rule will be added that allows an Agent to have no more than 150 A-Leads.
B-Lead CAP	Maximum number of B-leads	Lead Processing Portion	A rule will be added that allows an Agent to have no more than 150 B-Leads
A-Leads Weekly	Maximum number of A-leads allowed to be assigned to an agent in a week	Lead Processing Portion	A rule will be added that allows an agent to have no more than 20 A-Leads assigned in the current week.

Fig. 26



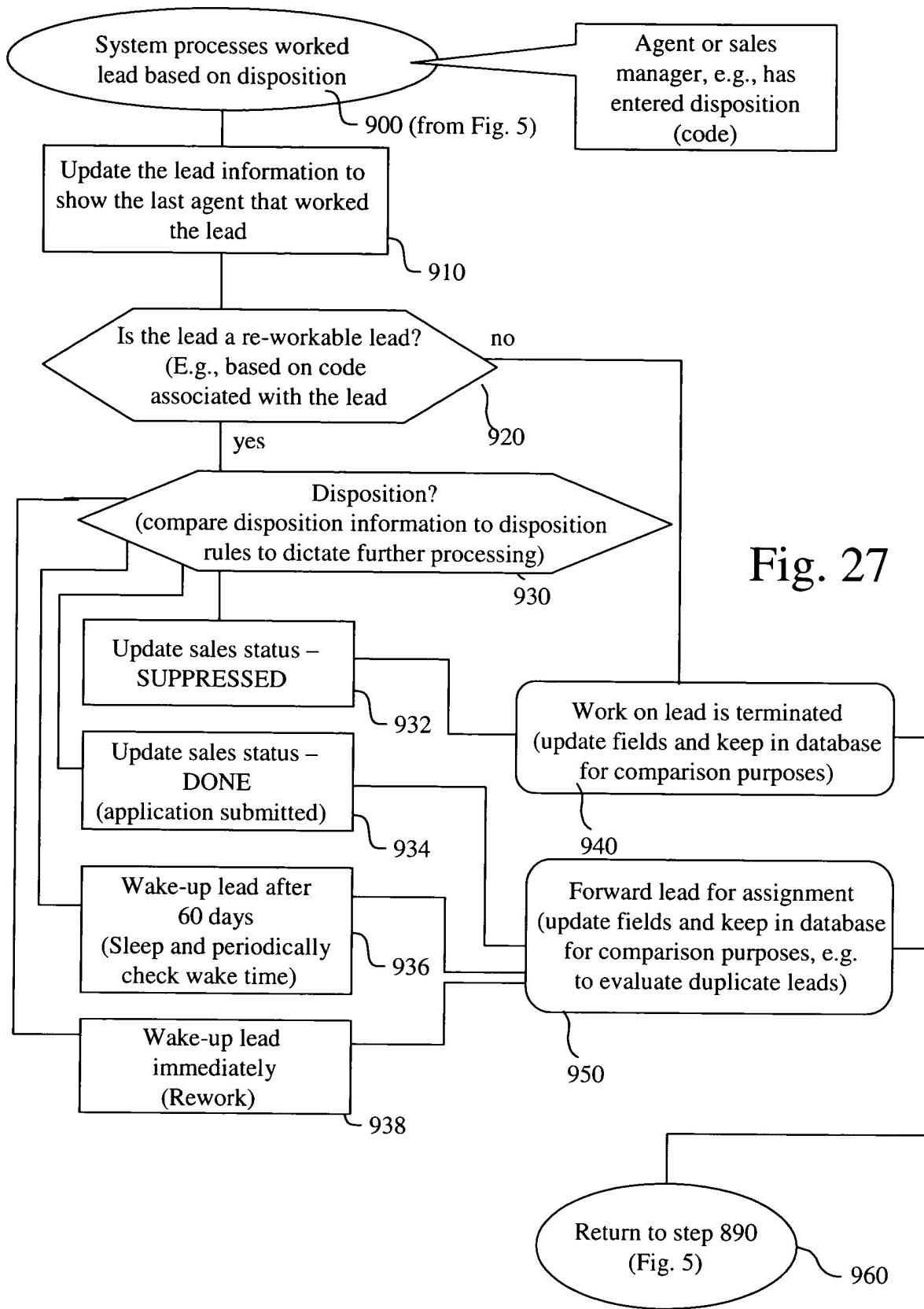


Fig. 28

